

Detailed TAP Instructions for the Tax Preparer

Tax Professional ~ Registering a New TAP User Account

1. Go to our TAP Website at <https://tap.dor.mt.gov>
2. Click Register Now link
3. Answer Questions
 - Are you a Professional Tax Preparer?
 - As a tax preparer, enter your SSN or FEIN
 - i. Enter your FEIN if you're working for a business preparing taxes
 - ii. Enter your SSN if you're preparing taxes for others but not as a business
4. Select Continue & System verifies if the Id exists in our tax systems.
YES- Id exist in our tax system, you can proceed in registering your Taxpayer Access Point (TAP)

user account

1. Enter profile information:
 - Name
 - eMail Address
 - Contact Phone Number
 - Alternate Phone number
 2. Login Information:
 - **User Id** - case sensitive & minimum of 6 characters
 - **Password** – case sensitive, minimum of 6 character, at least one numeric & one alphabetic character
 - **Secret Question & Answer** – case sensitive & make sure to remember it. If you forget your password, you will need your secret question & answer in order to change the password.
 - **Optional- Cell Phone Provider & Number**: if you would like the 1 time authorization code texted to your cell phone.
 3. Choose Continue
 4. Review Your Request & is this information correct?
 - Yes – click the Yes button
 - No – click No button & correct the necessary information
 5. Confirmation page – write down the “Confirmation Number”
 - Authorization Code- will only be needed for the very first time you log in
 - Call us if you do not receive the email containing the authorization code within in 10-15 minutes
 6. Go to our TAP website at <https://tap.dor.mt.gov>
 7. Type :
 - User Id
 - Password
 - Authorization Code
 8. Click Login
- NO** – Id did not exist in our tax system, you will need to register your FEIN or SSN with Montana.
*Message will appear “We do not have an account for your Id....”
1. Click “Create an account with the Montana Department of Revenue”
 2. Choose type of customer you are

- Business (FEIN) – if you’re working for a business preparing taxes
 - Individual (SSN) – if you’re preparing taxes for others, but not as a business
3. Type your Id number
 4. Complete Account Registration Form
 - Legal Business Name and if applicable Assumed Business Name
 - Owner’s First & Last Name
 - Business Location Address
 - Business Mailing Address
 - Contact Information: Name, Phone Number, Fax Number, email address.
 5. Choose Continue
 6. Review Your Request & is this information correct?
 - Yes- click the Yes button
 - No – click no button & correct the necessary information
 7. Confirmation Page – write down “Confirmation Number”
- Once Id has been registered, Tax Preparer will be notified via email.
- After Id reg is complete ~ restart instructions from the top of this page.**

Accessing Clients Accounts

NOTE: Taxpayer/client MUST have a TAP user account to grant you access to their Tax account.

1. Login to TAP
 2. Click “Add Access to Another Account”
 3. Select Account Type from drop down box & select Continue
 4. Enter the Client’s Account information
 - Individual Income Tax: SSN, Federal AGI (from last MT return filed) & Last name
 - Withholding Tax: Account Id, Zip Code, Last Payment Amount OR Line 5 from most recent MW3 filed)
 - All other Taxes: Account Id & Zip Code
 5. Click Continue & system will check to see if the Taxpayer has a TAP account.
 - **No** - Taxpayer does not have a TAP user account, the system will give you a message stating so & you will need to contact your client to set up their TAP user account & grant you access.
 - **Yes** - Taxpayer does have access continue to next step.
 6. Review request & Submit ...write down Confirmation Number
- At this point, an email will be sent to the taxpayer (client) stating you want access to their MT tax account. Immediately after they approve your access, you will receive an email stating you have access.